

RECORD OF PERFORMANCE QUALIFICATIONS
SK

INSTRUCTIONS

Record of Performance Qualifications shall be completed for enlisted personnel of the Coast Guard as outlined in the Enlisted Performance Qualifications Manual, COMDTINST M1414.8 (series). As proficiency in each performance qualification is demonstrated by actually performing the task listed, the DATE and INITIALS column shall be completed. Personnel are required to demonstrate proficiency in all new performance qualifications assigned to their rating. Performance qualifications previously demonstrated, dated and initialed off will not be recertified. Some performance qualifications include intent statements to help clarify the requirements of the task that is to be performed.

RATING

STOREKEEPER (Effective for the MAY 2003 Active Duty and the OCT 2003 Reserve SWE)

ABBREVIATION

SK

DATE COMPLETED ALL PERFORMANCE QUALIFICATIONS FOR RATE LEVEL

E-4

E-5

E-6

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NAME (Last, First, Middle Initial)

SOCIAL SECURITY NUMBER

SIGNATURE OF SUPERVISOR

[illegible]

REMARKS

RATING: STOREKEEPER	INIT	DATE
<p>A. SUPPLY SUPPORT</p> <p>4.01 Conduct an inventory of Supplies and Materials IAW the Supply Policy and Procedures Manual, COMDTINST M4400.19 (series), CMplus User Manual and CMplus Job Aids.</p> <p>Intent: Member should understand the purpose of completing and maintaining a physical inventory. Member must be able to identify the appropriate type of inventory for a particular situation and when they are required to be conducted. Member should be able to complete the entire Physical Inventory Procedure with, or without using the Barcode reader and ensure all discrepancies are documented and reported to the proper authority.</p> <p>4.02 Prepare the following MILSTRIP documents during the course of an actual Requisition IAW Supply Policy and Procedures Manual, COMDTINST M4400.19 (series):</p> <ul style="list-style-type: none"> a. Requisition b. Cancellation c. Follow-up d. Modification <p>Intent: Member must construct each of the MILSTRIP documents and understand which data/codes are entered in each record position. Member must understand the sequence of acquiring material. Member must know the appropriate approval levels for procurement of hazardous material, safety equipment, and reportable property.</p> <p>4.03 Prepare formatted and narrative MILSTRIP messages for the following types of requests IAW Supply Policy and Procedures Manual, COMDTINST M4400.19 (series), and CMplus Job Aids:</p> <ul style="list-style-type: none"> a. Requisition b. Cancellation c. Follow-up d. Modification <p>Intent: The member should choose the applicable message type and understand the rules that govern when each message is used. Member should understand which data/codes are entered in each record position.</p>		
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<p>4.04 Process incoming materials IAW the Supply Policy and Procedures Manual, COMDTINST M4400.19 (series) and Storage and Materials Handling, DOD 4145.19-R-1.</p> <p>Intent: The member should sign, inspect, inventory, and process incoming material. This includes proper handling of receipt documents, marking of materials for storage and material receipt acknowledgement. Member should also determine if material is hazardous, or reportable for property and add any items in the Oracle Fixed Asset Module (FAM) within the required timeframe.</p> <p>4.05 Report MILSTRIP Status to the requisitioner IAW the Supply Policy and Procedures Manual, COMDTINST M4400.19 (series) MILSTRIP/MILSTRAP Desk Guide (NAVSUP PUB 409), Defense Logistics Agency (DLA) Customer Handbook.</p> <p>Intent: The member should understand how to interpret supply and shipment status via message, or automated means, inform the originator and take necessary actions to complete the requisition and understand the reasons a MILSTRIP could be rejected.</p> <p>5.01 Prepare a Report of Discrepancy (ROD), (SF-364) IAW Supply Policy and Procedures Manual, COMDTINST M4400.19 (series) for the following:</p> <ul style="list-style-type: none"> a. Shipping Discrepancy b. Packaging Discrepancy <p>Intent: The member should understand when to submit an SF-364, the uses and response requirements, time standards for submission and how to distribute the completed form.</p> <p>6.01 Supervise an inventory of supplies and materials IAW Supply Policy and Procedures Manual, COMDTINST M4400.19 (series), CMplus Users Manual and Cmplus Job Aids.</p> <p>Intent: Member shall follow documented inventory procedures, organize and oversee personnel to insure all equipment i.e. scanners, reports, material-handling equipment is available and ensure all safety precautions are followed. Member will interpret the reports and understand how to reconcile any inventory discrepancies, either automatically, or manually.</p>		
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<p>6.02 Prepare a Quality Deficiency Report, (QDR) (SF-368), IAW Supply Policy and Procedures Manual, COMDTINST M4400.19 (series).</p> <p>Intent: The member should understand when to submit an SF-368 and how to notify the proper source of supply. The member must also know the time standards for submission, how to distribute the form and understand disposition and credit procedures for QDR material.</p> <p>B. INVENTORY CONFIGURATION MANAGEMENT</p> <p>4.01 Create an inventory item using CMplus, IAW CMplus User Manual and CMplus Job Aids.</p> <p>Intent: The member should know how to navigate to the proper screen and create an inventory item. The member must also know where to obtain the necessary data to fill in the required fields to save and create a new inventory item.</p> <p>4.02 Issue an inventory item using CMplus, IAW CMplus User Manual and CMplus Job Aids.</p> <p>Intent: The member should know how to navigate to the proper screen and issue an inventory item. The member must also know where to obtain the necessary data, fill in all required fields and issue an inventory item.</p> <p>4.03 Receive items using CMplus, IAW CMplus User Manual and CMplus Job Aids.</p> <p>Intent: The member should know how to navigate to the proper screen to receipt for commercial and MILSTRIP items. The member must also know where to obtain all necessary data to fill in required fields to complete a full or partial receipt.</p>		
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<p>C. SIMPLIFIED ACQUISITION PROCEDURES</p> <p>4.01 Prepare an OF-347, Order for Supplies and Services by manual or electronic means and procure supplies or services within the Simplified Acquisition Threshold (SAT) IAW Federal Acquisition Regulations (FAR), Coast Guard Acquisition Procedures (CGAP), COMDTINST M4200.19 (series), Finance Center Standard Operating Procedures (SOP) Manual FINCENSTIFINST M7000.1 (series) Transportation Acquisition Manual (TAM), Simplified Acquisition Procedures Handbook, COMDTINST M4200.13 (series), LUFS-NT Software User/Operator Manual (User's Guide)</p> <p>Intent: The member should understand the entire purchasing process following the six basic steps to procurement, including any necessary waivers, proper documentation, and necessary clauses. Member must also understand the breakdown and assignment of a standard DAFIS Document Number, accounting line and Procurement Instrument Identification Number (PIIN).</p> <p>4.02 Procure supplies or services under the micro purchase threshold using the Government wide commercial purchase card IAW Federal Acquisition Regulations (FAR), Finance Center Standard Operating Procedures (SOP) Manual FINCENSTIFINST M7000.1 (series), Simplified Acquisition Procedures Handbook, COMDTINST M4200.13 (series) LUFS-NT Software User/Operator Manual (User's Guide)</p> <p>Intent: The member should understand the micro purchase threshold, and the entire purchasing process following the six basic steps to procurement, including any necessary waivers, reviews and proper documentation. Member must also understand the breakdown and assignment of a standard DAFIS Document Number, accounting line and understand procedures for review and approval of Statement of Account (SOA).</p>		
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<p>5.01 Review Procurement Requests for completeness IAW Coast Guard Simplified Acquisition Procedures Handbook, COMDTINST M4200.13 (series), Page 2 of Form DOT F 4200.1.2CG, Finance Center Standard Operating Procedures (SOP) Manual FINCENSTIFINST M7000.1</p> <p>Intent: The member will review the Procurement Request for accuracy before submitting for procurement. Member should insure the following is correct: accounting data, approval signature, certification of funds, description, delivery date, sources of supply, sole source (if applicable), property review, and Pollution Prevention Coordinator (PPC) review. Member must also ensure conditions have been met for any special Procurement items. Member will contact customer for any missing, or incomplete data.</p> <p>5.02 Prepare a Coast Guard Simplified Acquisition Summary form (DOT F 4230.1) IAW Coast Guard Simplified Acquisition Procedures Handbook, COMDTINST M4200.13 (series).</p> <p>Intent: The member should understand when the form is used and determine price reasonableness, competition and business size. If written quotes were used, member will verify completed Request for Quotations (SF-18/SF-1449). Member should ensure the summary is properly signed and filed. Any missing information will be brought to the Contracting Officer's attention.</p> <p>6.01 Prepare the following documents IAW Finance Center Standard Operating Procedures (SOP) Manual, FINCENSTIFINST M7000.1 (series), Coast Guard Simplified Acquisition Procedures Handbook, COMDTINST M4200.13 (series), Supply Policy and Procedures Manual, COMDTINST M4400.19 (series), Coast Guard Acquisition Procedures (CGAP), COMDTINST M4200.19 (series):</p> <ul style="list-style-type: none"> a. Requisition and Invoice/Shipping Document (DD-1149) b. Military Interdepartmental Purchase Request (MIPR) (DD-448) <p>Intent: The member should understand when and how to use each form for purchase/transfer of bulk fuel, petroleum oil and lubricants or services and supplies from a DOD/OGA source. Member should also know the proper fund and accounting line for each type of request.</p>		
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<p>6.02 Prepare the following documents by manual or electronic means and procure supplies or services within the Simplified Acquisition Threshold (SAT) IAW Federal Acquisition Regulations (FAR), Coast Guard Acquisition Procedures (CGAP), COMDTINST M4200.19 (series), Finance Center Standard Operating Procedures (SOP) Manual FINCENSTIFINST M7000.1 (series) Transportation Acquisition Manual (TAM), Coast Guard Simplified Acquisition Procedures Handbook, COMDTINST M4200.13 (series), LUFS-NT Software User/Operator Manual (User's Guide):</p> <p>a. Solicitation/Contract/Order for Commercial Items (SF-1449) b. Amendment of Solicitation/Modification of Contract (SF-30)</p> <p>Intent: The member should understand the entire purchasing process following the six basic steps to procurement, including any necessary waivers, proper documentation, and necessary clauses. Member must also understand the breakdown and assignment of a standard DAFIS Document Number, accounting line and Procurement Instrument Identification Number (PIIN) for each form indicated. Member must also understand the different types of modifications and the reasons one is issued.</p> <p>7.01 Review ratification documents for an unauthorized commitment IAW Coast Guard Simplified Acquisition Procedures Handbook, COMDTINST M4200.13 (series), Transportation Acquisition Manual (TAM), Coast Guard Acquisition Procedures (CGAP), COMDTINST M4200.19 (series).</p> <p>Intent: The member should assist and collect documents from the individual who made the unauthorized commitment to ensure all four steps for ratification have been completed in the required timeframe prior to submission to the Contracting Officer.</p> <p>7.02 Audit closed contract files for compliance IAW Coast Guard Simplified Acquisition Procedures Handbook, COMDTINST M4200.13 (series).</p> <p>Intent: Member will review a contract file for completeness as per local procurement compliance checklist guidelines. Member should be able to make determination that the file has enough documentation to withstand audit on it's own. Member will report audit results to the Contracting Officer.</p>		
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<p>D. FINANCIAL MANAGEMENT</p> <p>8.01 Complete a unit budget IAW Financial Resource Management Manual, COMDTINST M7100.3 (series). LUFS-NT User's Guide, Appendix A, Funds Management.</p> <p>Intent: The member should have a basic knowledge of the Coast Guard Budget Process and use of appropriations. Member will assist unit in collection of data, backlog lists, and use budget worksheets to forecast the needs of departments for future procurement requirements. Member should coordinate the approval and execution of the budget within the command.</p> <p>E. PROPERTY</p> <p>4.01 Prepare the following documents for transfer of Personal Property between agencies IAW Property Management Manual, COMDTINST M4500.5 (series), IFAMS Software User Operator Manual, (User's Guide), Coast Guard Simplified Acquisition Procedures Handbook, COMDTINST M4200.13 (series):</p> <ul style="list-style-type: none"> a. DOD Single Line Item Release/Receipt Document (DD-1348-1) b. Requisition and Invoice/Shipping Document (DD-1149) <p>Intent: The member should have a basic knowledge of the Property Management Policy and understand the differences between reportable/non-reportable property. The member should also know the purpose of each form and order of priority governing the release of excess property. The member must understand screening, approval and documentation requirements in the Oracle Fixed Assets Module (FAM) and submit the forms for supervisor review.</p> <p>5.01 Transfer Personal Property between agencies IAW Property Management Manual, COMDTINST M4500.5 (series), IFAMS Software User Operator Manual (User's Guide).</p> <p>Intent: The member should review prepared forms, correct any discrepancies and upon approval transfer the Property for disposal, or permanent transfer to another agency or CG unit. The member must document the transfer in the Oracle Fixed Assets Module (FAM).</p>		
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<p>5.02 Review a property report upon completion of a physical inventory IAW Property Management Manual, COMDTINST M4500.5 (series), IFAMS Software User Operator Manual (User's Guide).</p> <p>Intent: The member must know how to produce the report in the Oracle Fixed Assets Module (FAM) and understand when an inventory is required. The member will ensure all required information is included, correct any discrepancies in the (FAM) and depending on the type of inventory, make distribution and ensure survey and final approving authority requirements are met.</p> <p>5.03 Prepare a Report of Survey form (CG-5269), IAW Property Management Manual, COMDTINST M4500.5 (series).</p> <p>Intent: The member will assist custodian as necessary in the block by block preparation of survey reports, for damaged, destroyed, lost or stolen property. The member will also advise the custodian of their Property Management responsibilities.</p> <p>6.01 Review a Report of Survey form (CG-5269), IAW Property Management Manual, COMDTINST M4500.5 (series).</p> <p>Intent: The member must know survey and final approving authority requirements. The member must also know board convening composition and special item requirements. The member will ensure all required information is included and make the mandatory distribution depending on the type of property involved.</p> <p>6.02 Prepare and submit a Report of Excess Personal Property (SF-120) by manual or electronic means IAW Property Management Manual, COMDTINST M4500.5 (series).</p> <p>Intent: The member must know the entire process of reporting excess property, including timeframes, were to submit and proper approval. The member must understand where to obtain all required data, how to withdraw, or cancel an existing SF-120. Member will understand action necessary to release or ship material requested.</p>		
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<p>7.01 Prepare the following annual management reports IAW Property Management Manual, COMDTINST M4500.5 (series):</p> <ul style="list-style-type: none"> a. Report of Survey Activity b. Report of Utilization and Donation c. Report of Non-Federal Recipient d. Report of Exchange Sale <p>Intent: The member must know how to prepare each report in the proper format and submit on the required date. Member should understand what agencies receive the information and what it is used for.</p> <p>F. TRANSPORTATION</p> <p>4.01 Ship non-hazardous materials through a government approved carrier IAW Inspection, Packaging, Handling, Storage and Transportation Handbook, COMDTINST M4450.1 (series), Transportation of Freight Manual, COMDTINST M4610.5 (series), Packaging of Material, Preservation NAVSUP Pub 502, Vol I, Packaging of Material, Packaging NAVSUP Pub 503, Vol III.</p> <p>Intent: The member must have basic knowledge of policies and procedures for transportation and freight management functions. Member will prepare material, including those requiring special handling for carrier pickup. This will include, labeling, loading, unloading, measuring, packaging and weighing. Member will complete documents requesting shipping from local Electronic Transportation Acquisition (ETA) Site.</p>		
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<p>GLOSSARY</p> <p>AUDIT - To examine and verify accounts and records.</p> <p>CONDUCT - To direct an action or evolution by a documented procedure.</p> <p>COMPLETE - To follow a process or procedure from initial identification to submission of any required reports or forms.</p> <p>CREATE - To take action to make a new record item in a computer application.</p> <p>ISSUE – To take action to give out and place an item in an issued status in a computer application.</p> <p>PREPARE - To plan, gather, and assemble information to produce a document (i.e. forms and reports).</p> <p>PROCESS – To receive, record, and account for incoming material.</p> <p>PROCURE - To purchase a required item through an authorized process.</p> <p>REPORT - To provide information on ongoing purchase requests.</p> <p>REVIEW - To examine a document or process for accuracy in content and/or format and report errors or updates to the author or controlling authority.</p> <p>SHIP - To send material from one place to another via authorized means.</p> <p>SUBMIT - To prepare a report or form following a defined process and forwarding it to the prescribed authority.</p> <p>SUPERVISE - To direct an action or evolution as the leader (Supervisor).</p> <p>TRANSFER – To prepare papers and move property from on place to another.</p> <p>A Complete Reading List containing links to all Reference Material related to these Performance Qualifications is located at the Storekeeper Subject Matter Specialist Homepage, at http://www.uscg.mil/hq/tcpet/tpf/sksms/sksms.htm</p>		
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